

This article provides you with a clear explanation of the UGM approach to facilitating a senior team's strategic planning, including the research base behind the approach. It also addresses the most common questions we get asked about how strategic problem solving can be designed in order to produce a robust and actionable plan to take the business forward. The UGM approach steps you through a logical sequence of specially selected tools, providing both the stimulus and structure needed for good quality problem solving.

A common problem!

Does this sound at all familiar?

For the last few years, your organisation has, in effect, 'outsourced' your strategy to a big consulting firm. Each year, they send you a team to gather data, crunch the numbers and draw up a plan. Typically, a couple of weeks later, they present their plan (a thing of beauty!) to your Board and Division Heads. Then they leave until next time! But not much in these plans ever gets implemented. In fact, they mostly don't even see the light of day but gather dust, becoming fossilised relics of great ideas that came to nothing.

However, this year, your CEO has decided 'enough's enough'! A memo comes round. It seems the senior leadership team (including you) is going to spend a day together away from the office and, for the first time, you're going to create the plan yourselves. The CEO hopes this might ensure the strategic plan is a bit more down to earth and give it more chance of being implemented.

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But the Big Strategy Day hasn't worked out quite as you anticipated. It started out OK, with a lot of energy and excitement in the conference room. After all, as you noted, looking round at your colleagues, everyone there was clever, experienced and committed. Things kicked off well enough, with a lot of talk about various competitors – what they seemed to be doing, and why they were beating you in some sectors traditionally owned by you. Then the CEO led everyone in putting together a sheaf of SWOTs – one reflecting the company overall, and one for each division. After that, things began to drift, with the 'usual suspects' dominating the airtime. Small 'side' conversations broke out, where people took the opportunity to outline their pet ideas and complaints on every company problem under the sun, from IT inefficiencies to HR inadequacies. At 6pm, when it was time to decamp to the bar, you felt frustrated without being able to pin point how it could have been any different – at least you had those SWOTs....

The source of the problem

Over many years of helping clients design their strategy, we've found the scenario above is surprisingly common. 'There must be a better way,' you might well be thinking and rest assured there is!

At the heart of the problem is the fact that, for most of us, *thinking together* isn't a skill that is particularly well developed. This shouldn't surprise us. After all, our education system and most of our workplace experience teaches, prioritises and rewards our ability to think alone. Indeed, UGM research on this point has shown that most meetings (from informal to quite formal), are not about working together to solve shared problems, but are more like cabaret performances, where the most dominant team members parade their expertise and pet ideas! Does this sound familiar?

Research shows that many of us think, make decisions, and solve problems most efficiently when we're alone – and even not at work at all. We might be in the shower, out jogging or walking, maybe swimming, stuck in traffic or simply commuting. Our thinking can be much more efficient when we are *not* with our colleagues! No wonder 'strategic planning' is so often experienced as a waste of time, and certainly not an activity driving powerful actions that change the business.

A better way to tackle strategy

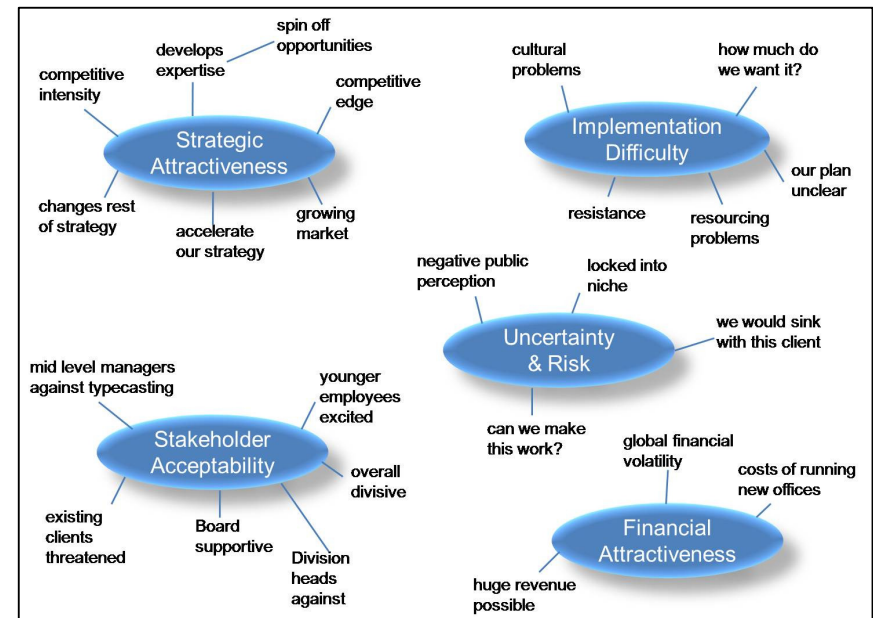
The approach we take to strategic planning involves stepping you and your team through a carefully chosen sequence of robust thinking tools, tailored to your organisation’s particular business challenges. Research studies and our own experience over many years of strategy facilitation consistently demonstrate that visual tools help to focus diverse minds and thinking styles. They provide both stimulus and structure and ensure a senior team is able to think well together.

This matters because the very significant degree of complexity facing organizations today means that no single individual (no matters how senior, knowledgeable or talented) can devise the best way forward by thinking entirely alone. You need all the brain power you can get! There’s no room in a modern, successful organization for the old hero-leader who comes to work on a Monday morning with a complete strategic plan that they devised alone over the weekend. It doesn’t work and they rarely get the buy in and engagement they need.

A strategy tool kit

We have developed a suite of more than fifty strategic planning tools. From these we will typically select around twenty that we sequence into small logical steps, where each tool directs the team’s attention to a specific area that requires focus and analysis. Some of these tools are ‘classic’ and well-known to strategists, but we’ve designed additional methods of getting the most out of them. Others are our own proprietary tools that we’ve created in order to help a team think more sharply, especially in areas where strategic blind spots are common.

The strategic options map adjacent captures the thinking of the leadership team of a professional services company, grappling with a strategic option facing them. Will they embark on a major contract with a new client in a new sector? The strategic options map helped them clarify the interdependent variables.



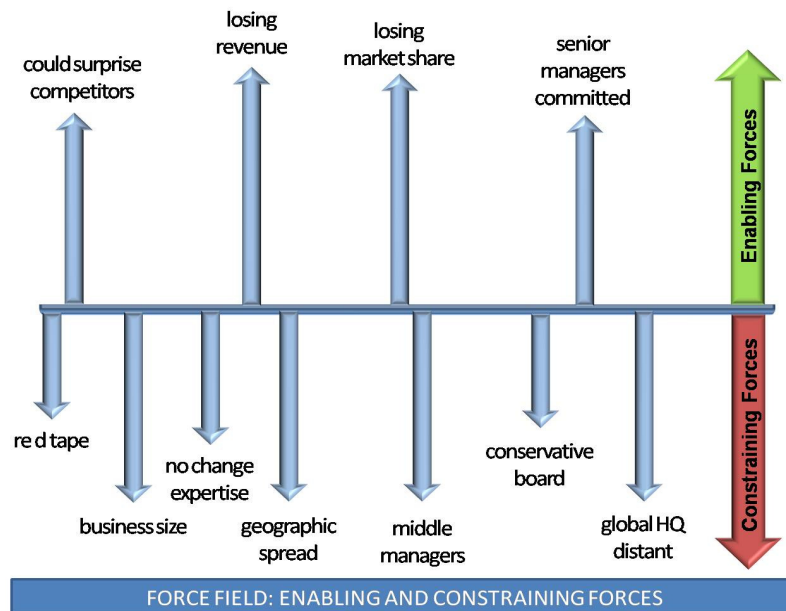
STRATEGIC OPTIONS MAP

Benefits of using tools to facilitate strategic thinking

The tools help a team to:

- Uncover and challenge their assumptions and underlying patterns of thinking
- Include and benefit from diverse perspectives and draw disparate ideas into practical implications
- Shape creative and imaginative breakthroughs
- Map possible scenarios and test their impact
- Display the potential interaction of different variables
- Transform thoughts into actionable plans
- Demystify strategic thinking and communicate swiftly to other stakeholders

Over and over again, we find that good quality, collaborative problem solving requires the structure and support of thinking tools that have visual impact.



You can see from this force field analysis drawn up by a group of senior managers that they foresaw significant challenges ahead. The key point is that a force field analysis of this type should not simply be used to hold a mirror up to reality (reflect) but to probe more deeply to determine what can be done (reshape). Indeed, that is just what these managers moved on to do, by examining the power base of each stakeholder group and identifying leverage points for the change that was so urgently needed. This helped them to set out on a problem solving sequence that was eventually very fruitful. With a better power base in position, they were finally able to move forward.

The attraction and usefulness of the Force Field analysis lies in the way it helps us differentiate between two different and opposing aspects (positive and negative) of the same variable. So this opens up multiple possibilities for applying the tool to support analysis of various categories of strategic problems.

Additional benefits

Adopting this approach has some other exciting benefits for you, your team and your organization.

After you've worked in this way and experienced firsthand what it's like to be with a team that is genuinely thinking together, you'll find yourself using the tools you've learned in many of your regular meetings and professional conversations. You'll see how they sharpen and speed up problem solving and decision-making – the two core activities of knowledge workers in every profession. As you do this, you'll begin to notice others taking them up as well - because they too have seen for themselves the difference the tools make.

In this way, our approach to strategic planning has an impact well after the initial event. It provides an enduring legacy of strategic skills in your organization and starts to build a strategic thinking capability at all levels. This then becomes a genuine business differentiator and a competitive advantage, setting you apart in your market. Essentially, it means your people can think *together* to solve the problems they must tackle *together*.

Examples from the UGM strategy toolkit

We have a suite of more than fifty different tools, a considerable number designed as a result of working with senior teams over many years and noticing where they seem to need particular support. As mentioned above, some are part of our own proprietary UGM IP, while others are updated and modernized versions of classic tools. We also like to introduce multiple ways you can use a single tool. We find ourselves drawn to things that are practical and flexible, and this style seems to resonate with our clients.

In our Resources section you'll find illustrations of exactly this point. We show you how we use tools in particular ways, as small steps in strategic planning with quite different client organisations. This gives you a glimpse of the UGM down-to-earth approach and also, we hope, will inspire you to dust off and look again at some classic tools you might like to bring to your own team's problem solving.

Conclusion

To produce a sound, high quality strategic plan requires a senior team to think well together. But this isn't easy. It becomes even more challenging – and often impossible – when a team sits down to plan with no structure to support them. Thinking together is quite different from thinking alone. Visual tools are required if you want to focus diverse minds and problem solving styles. The UGM approach is based on the most up-to-date insights about how teams operate to solve problems and make decisions. We bring to working with you an extensive portfolio of strategic thinking tools that will help you to design the best possible plan to take your business forward. This article on 'Strategy Design and Facilitation' leads directly into our approach to implementation. You can read about this by clicking on 'Strategy Implementation'.

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